Policy and Procedures Writing Guide

Drafting a Policy – Policy Format

All policies must follow a standard format to ensure consistency between policies. Below is a description of the information that should be included under each major heading.

Policy Number – (optional)

Effective Dates- (required)

Reviewed and Revised Dates – (required)

Policy Title – should capture the content of the policy; should not include the word "policy."

Purpose – a brief statement of the purpose of the policy which many include a basic explanation for the policy if not apparent on its face.

Additional Authority – list of statute, regulation or other relevant authority governing the policy.

Scope – to who or what does the policy apply? For example: all employees, all participants or etc.

Responsible Party – list individual's position or other pertinent area responsible for administering or enforcing policy. A contact phone number should also be included, but due to the difficulty associated with updating information, please do not name specific contact employees.

Definitions – uncommon words or words with meanings unique to higher education should be defined and listed in alphabetical order.

I. **Policy Statement** – the policy statement provides a rationale for the policy, including underlying philosophy of the policy and what the policy hopes to accomplish. This section may include a statement of how the policy is related to the agency's core mission and values. Policy Statements range from 1-2 sentences to a paragraph in length, depending upon the subject matter. This should include the IDAPA, provider agreement requirements.
    A. Policy – main text of the policy.
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            a.
                1.

II. **Procedure** -includes the steps necessary to comply with the policy, with sufficient detail that end users will readily understand how to comply with the policy mandates. Procedures should be consistent with the policy section. The procedures should include timelines such as when the task is to be completed and monitored for completion. Forms associated with the procedure should be linked in the document.

Drafting a Policy – Style Tips

- Policies should be clear and concise and written in the third person.

- Words should be selected carefully. Words such as *should* and *may* imply choice.
- Do not use information that may quickly become outdated such as employee names or web addresses.
- When using acronyms, spell out the words the first time, then indicate the acronym in parenthesis, e.g., State Board of Education (SBOE).